# Responding to RFPs

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Illustrative case · Example Equipment Inc. · 900 employees · fictitious company

## THE WORKFLOW AS IT RUNS TODAY

**≈ 8** bids a month (illustrative) · **≈ 60%** of questions already answered (illustrative) · **≈ 6 days** of work per bid (illustrative) (illustrative, approximate figures)

● friction point

**STEP 1**
**RFP package received**

→

**STEP 2**
**Requirements reviewed**
● Requirements scattered across appendices

→

**STEP 3**
**Past proposals searched**
● Right version hard to find

→

**STEP 4**
**Sections drafted one by one**
● Same text rewritten for every bid

→

**STEP 5**
**Expert input gathered**
● Last-minute follow-ups

→

**STEP 6**
**Pricing, review, signature**
● Little time left for pricing

**BEFORE YOU START**

**Build the answer library.**
Gather approved answers, data sheets, certificates, and cleared references; give each answer an owner and an expiration date. The tool comes after.

**UNDER THE HOOD**

Requirements extracted from the RFP package, permission-filtered hybrid search over a library of approved answers, deterministic rules for source validity and commitment sections, answers drafted by an LLM instructed to cite every source, and input and output guardrails with routing to the sales engineer. A loop connects the log, sales review, and the evaluation set. Diagram and controls on page 2.

**STAGE 1** HUMAN IN THE LOOP

### The assistant drafts the first pass, the sales engineer decides

1. **The RFP comes in** — through the same channel as today.
2. **The assistant drafts a first pass** — question by question, citing the source.
3. **The sales engineer decides** — completes, corrects, and prices.
4. **Every correction is logged** — section by section.

What this stage produces: a section-by-section measure of how accurate the proposed answers are.
Estimated duration: 2 to 3 months.

**STAGE 2** THE ASSISTANT COMPLETES AUTHORIZED SECTIONS

### It completes authorized sections; the sales engineer owns the commitment

**COMPLETES WHEN**
- The question matches an approved answer
- The source is current and cleared for use
- The section involves no pricing, timeline, or commitment

**ROUTES TO THE SALES ENGINEER WHEN**
- The question is new or ambiguous
- No approved, current source covers it
- The section involves pricing, timelines, warranties, a deviation from the specifications, or similar

Every week, the sales team reviews a sample of completed sections and keeps the library up to date.

## WHY HERE, AND UNDER WHAT CONDITIONS

**High volume · Clear owner · Clear output · Known pain point**

- **An approved answer library** kept current, with an owner for each answer.
- **Current internal sources** data sheets, certificates, approved references.
- **No commercial commitment** left to AI: pricing, timelines, warranties, signature.
- **Unusual, sensitive, or ambiguous bids** routed to the sales engineer.

The risk does not go away, but it becomes more visible, measurable, and manageable.

## MOVING FROM STAGE 1 TO STAGE 2

Decided one section at a time, not in advance, based on what the sales team observes during stage 1:

- Accuracy and sourcing of proposed answers
- Corrections needed, by section
- Exceptions correctly routed
- No significant incident observed within the tested scope
- A current library, each answer with an owner

**The company overview and certifications could move to stage 2, while technical answers stay in stage 1.**

## THE GOAL, AND HOW TO MEASURE IT

Not to take bid work away from sales, but to stop rewriting the same text, get a first draft sooner, and free up time for the solution and pricing.

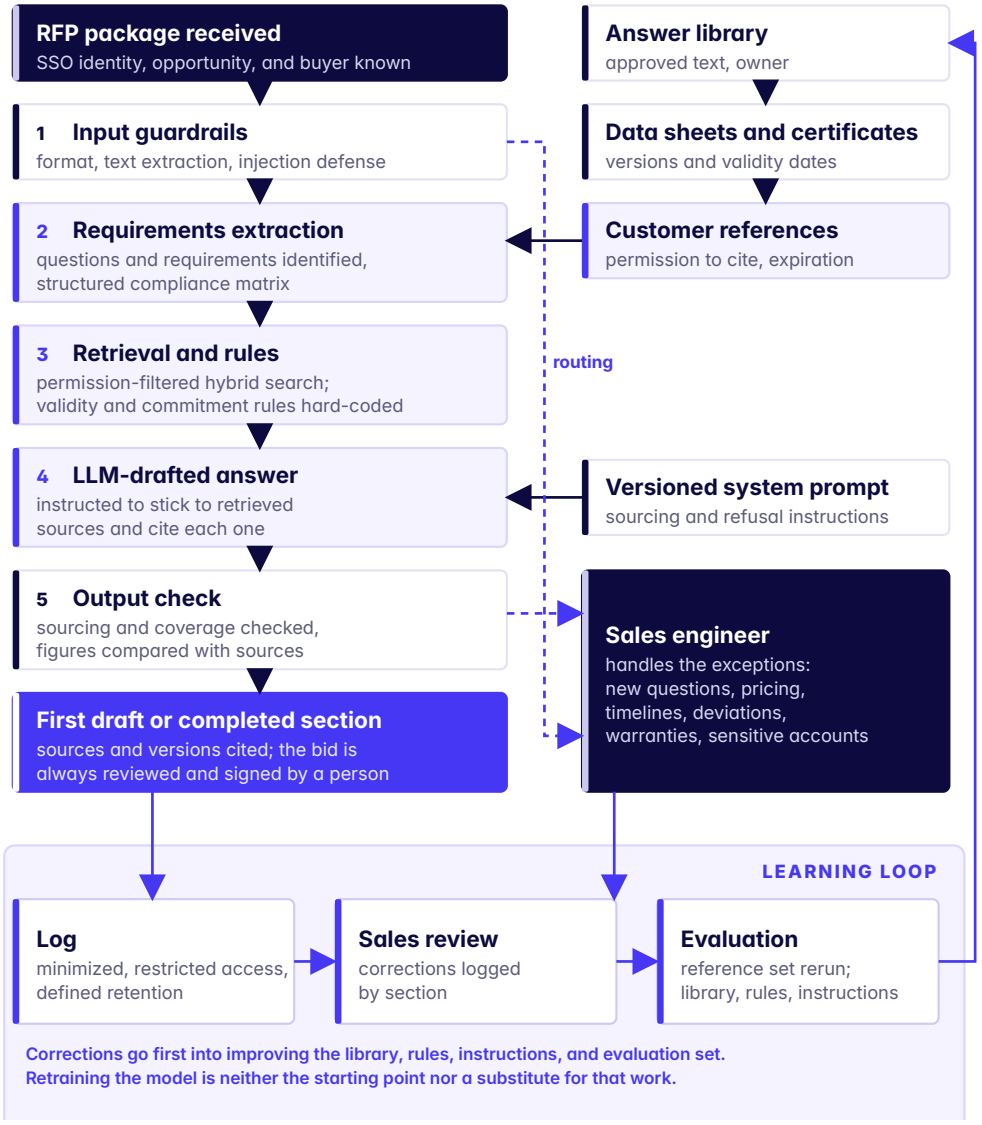
**Time from receipt of the RFP to a complete first draft**

**≈ 6 days** → **≈ 3 days**

today (illustrative) → illustrative stage 2 target · also tracked: the share of standard sections reused without rewriting, 50–60% (illustrative target)

# Reference architecture: how the system stays under control






## CONTROLS AND SECURITY

### Evaluation

A reference set of about 40 past bids, pseudonymized or minimized, with the final answers annotated by sales engineers. Metrics: answer accuracy and sourcing, unsourced claims, requirement coverage, and the rate at which exceptions are correctly routed (routing recall). Rerun whenever the model, the library, or the instructions change.

### Observability

Every run is logged: requirements extracted, IDs of cited sources, routing decision. Buyer data, pricing, and résumés: log minimized, access restricted, retention defined by purpose and applicable obligations.

### Identity and access

SSO (SAML or OIDC). Permissions apply at retrieval: pricing, margins, and résumés visible by role. Only an answer's owner can change it. Signing authority stays with authorized signatories.

### Data

Hosting and data transfers verified for the chosen solution; contractual terms barring use of the data for model training; encryption; buyer confidentiality and RFP rules taken into account; documented Swiss FADP assessment.

### Application security

Safeguards against prompt injection, including in the buyer's documents. Permitted outcomes: draft a sourced first pass, complete an authorized standard section, or route to a person. Submission and signature stay with people.

**Three ways to build it**

Three options: the module in your existing sales tool, a proposal management platform, or a custom build (extraction, retrieval, model API). The choice comes after the library audit, not before.